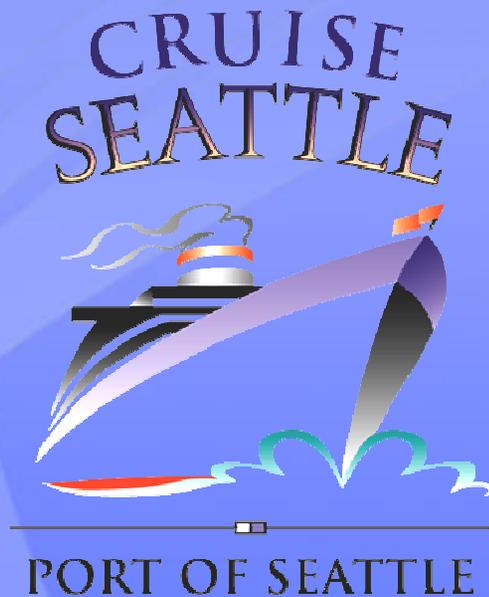


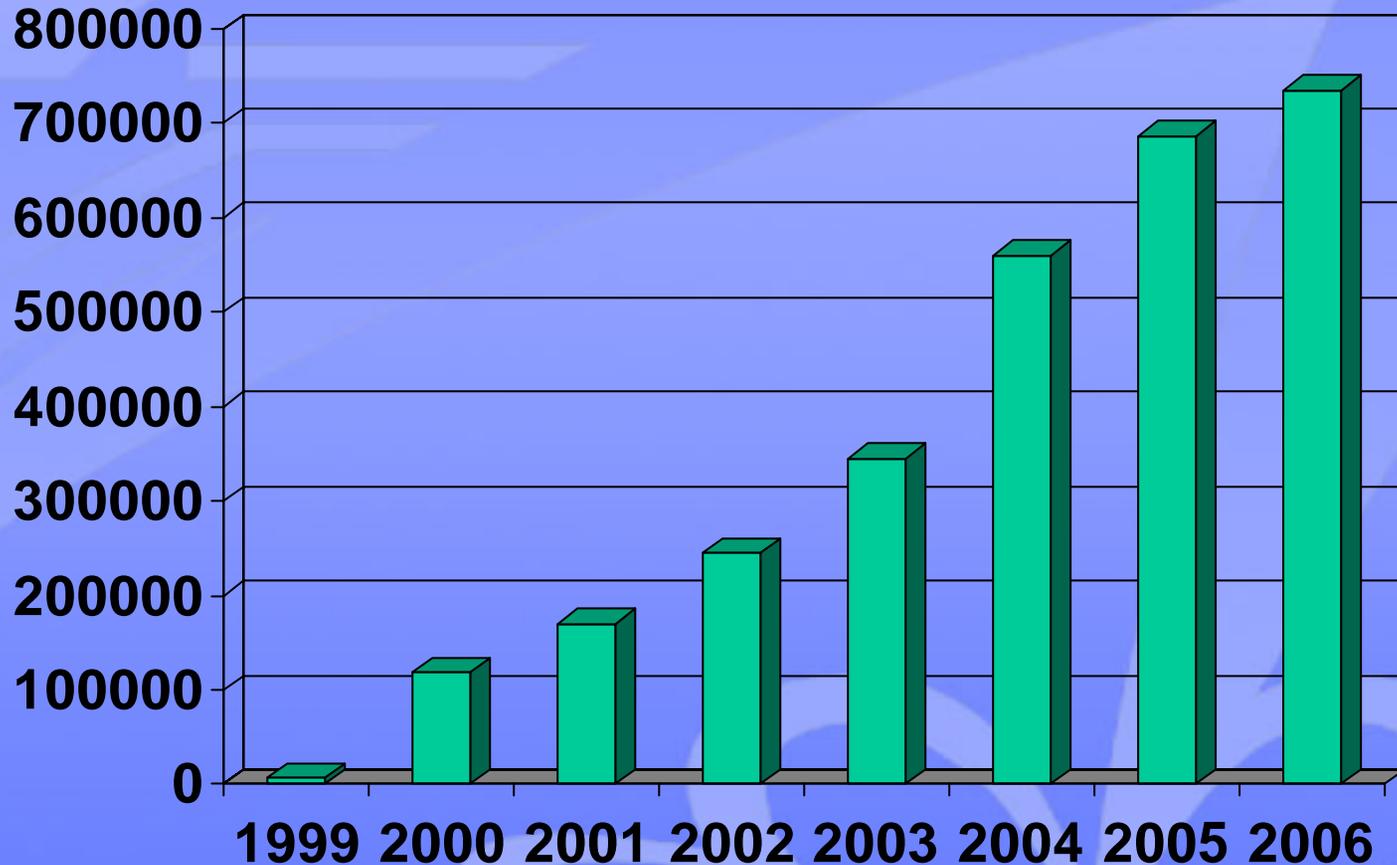
Seattle: A Case Study in Cruise Terminal Development



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Cruise Passenger Growth 1999 - 2006



The Seattle Model

A proactive partnership with a shared goal



Case Study: Seattle's Cruise Terminals

- **Bell Street Pier**

Open May, 2000

One berth; part of 11-acre multi-use, downtown waterfront development

- **Terminal 30**

Open May, 2003

Two berths; dedicated for cruise

Located near cargo terminals and sports stadiums, south of downtown

Bell Street Pier Development Model

- Original cruise terminal “shell” was designed in the early 90’s when ships were smaller and when Seattle had limited cruise port experience
- The build-out involved NCL, but many details were predetermined by the multi-use, master planned development
 - Aesthetically “upscale”; high end finishes and furnishings
 - VIP lounge
 - Concierge
 - Parking garage
- Cost: \$16.5 million

Vision and Commitment Transform Seattle's Waterfront



A Multi-Use Facility



Bell Street Pier

“Making It Work”

- Open May 2000.
- 68,146 square feet on two levels
- Maximum length/draught: 1600 feet/35 feet
- Accommodates 2,600 passenger vessels
- Mechanized gangway system provides access from 2nd floor
- Hospitality corridor features retail kiosks, café, and concierge
- 1,700 space parking garage across the street

Bell Street Pier Cruise Terminal



Terminal 30

Responding to Market Growth



Terminal 30 Development Model

- Dedicated, “interim” terminal
- Schedule and permit issues resulted in compromises
- Approach was to focus on the “basics”
 - Balance flexibility with functionality
- Schedule resulted in cost premiums
- Industrial neighborhood determined building aesthetics
- Minimal “multi-use”
- Cost: \$18 million

Terminal 30

A Dedicated Cruise Facility



Terminal 30

“Focusing on the Basics”



Terminal 30

Flexible and Functional



Lessons Learned

- Stay informed on cruise industry trends
- Dedicated vs. multi-use -- each approach poses challenges and compromises
- Location determines constraints and aesthetics
- Considerations for future planning

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